

Four Steps to Change Dates on Existing POs

1. Under [Header Details](#), change this accounting date to July 1 or later:

PO Header Details

Unit: 11000 PO ID: NEXT Vendor:

PO Details

Vendor: PO Date: 05/09/2011
 *PO Type: GEN Budget Status: Not Chkd
 *Billing Location: 110001 [Billing Address](#) ☒ Tax Exempt ID: E-2001
 Origin: Letter of Credit ID:

Currency

Currency Code: USD [Exchange Rate Detail](#) Base Currency: USD
 Rate Date: 05/09/2011 Exchange Rate: 1.00000000
 Rate Type: CRRNT

Process Control Option

Acknowledgements required for: Not required Accounting Date: 07/01/2011
☒ Dispatch *Method: Accounting Template: STANDARD

2. Under the PO Defaults link, make sure the budget date here changes to the new biennium as well:

Purchase Order Defaults

Unit: 11000 PO ID: NEXT Vendor:

Default Options

☐ Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category: Unit of Measure:

Schedule

Ship To: Ultimate Use Code:
 Due Date: Original Promise Date:
 Ship Via: COMMON Freight Terms Code: FOB DEST
 Arbitration: Freight Charge Method: Weight
 *Distribute by: Quantity [One Time Address](#)

Distribution

SpeedChart:

Distributions

Chartfields [Asset Information](#)

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Class	Budget Date	Location
1	100.0000	11000		110	001	1000	11030	07/01/2011	

OK Cancel Refresh

3. After you click OK on the screen above, you will probably get a message about retrofitting field changes. Carefully read this screen to change the budget dates on all distribution lines. Do not change any other field, then click "OK." (NOTE: *This will not work if the PO has already been partially paid. See box on the next page.*)
4. All distribution lines should have the new budget date. Whether your PO has one line or 41, by changing the budget date under PO Defaults, all distribution lines should change to the correct date. You should review the PO under **Express Purchase Orders** to make it easier to double-check these date fields before budget checking.

If the PO has already been partially paid and PeopleSoft will not allow you to retrofit the budget dates, you have a choice on how to proceed:

- a) Close that PO manually and budget check to remove any remaining encumbrances. Pay the remaining items on the PO with a regular voucher in the new biennium, referencing the PO in the voucher's Invoice Number, Comments, or Message fields.
 - b) Copy the old PO into a new one with all dates in the new biennium. Delete lines or decrease quantities on items already paid before budget checking. Pull this new PO into a voucher that is also budget checked in the new biennium.
-